


# ChesapeakeDecisions: Supporting the SRS and Second Cycle Process Improvements

**Doreen Vetter and Carin Bisland**

Show ChesapeakeDecisions features designed and developed to support the SRS.

Summarize SRS process and materials improvements based on input and feedback.






**“ The SRS is the Chesapeake Bay Program’s systematic approach to **adaptive management.**”**



“

ChesapeakeDecisions  
**documents and supports**  
the Strategy Review  
System (SRS).



**“ BOTH** have been informed by extensive **research, user testing,** and **interviews** with SRS participants and support staff.



# You need assurances...

Clarify and simplify instructions and materials	✓
Improve access to documents	✓
Track dates and deadlines	✓
Track requests and decisions	✓





**“ We need:**

- A few volunteers for user testing (~1 hour sometime in the next two weeks).
- Everyone else to become familiar with the features upon launch.



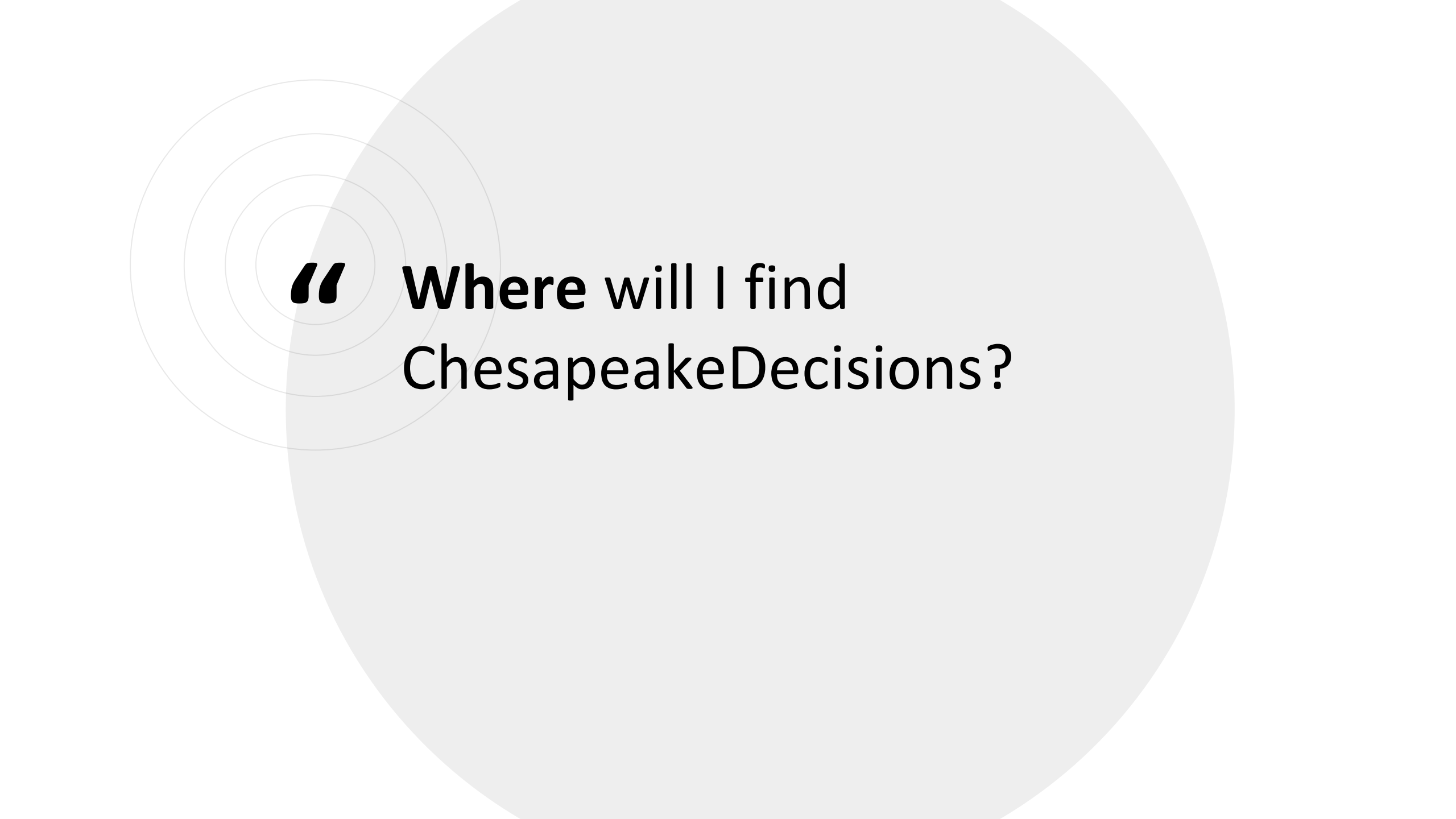
**ChesapeakeDecisions has  
been designed,  
developed, and final  
content is being loaded.**





“

ChesapeakeDecisions will be the **authoritative source** of documents and information for participating in the SRS process.



**“ Where will I find  
ChesapeakeDecisions?**



**Chesapeake Bay Program**  
*Science. Restoration. Partnership.*

[Discover the Chesapeake](#)[Learn the Issues](#)[State of the Chesapeake](#)[Take Action](#)[In the News](#)[Who We Are](#)[What We Do](#)

WHAT WE DO > WHAT GUIDES US

## What Guides Us

Over our long history, a series of written agreements and science-based goals have guided our work, helping our partners track changes in the health of the Chesapeake Bay.

On the existing Chesapeake Bay Program website @ [www.chesapeakebay.net](http://www.chesapeakebay.net).

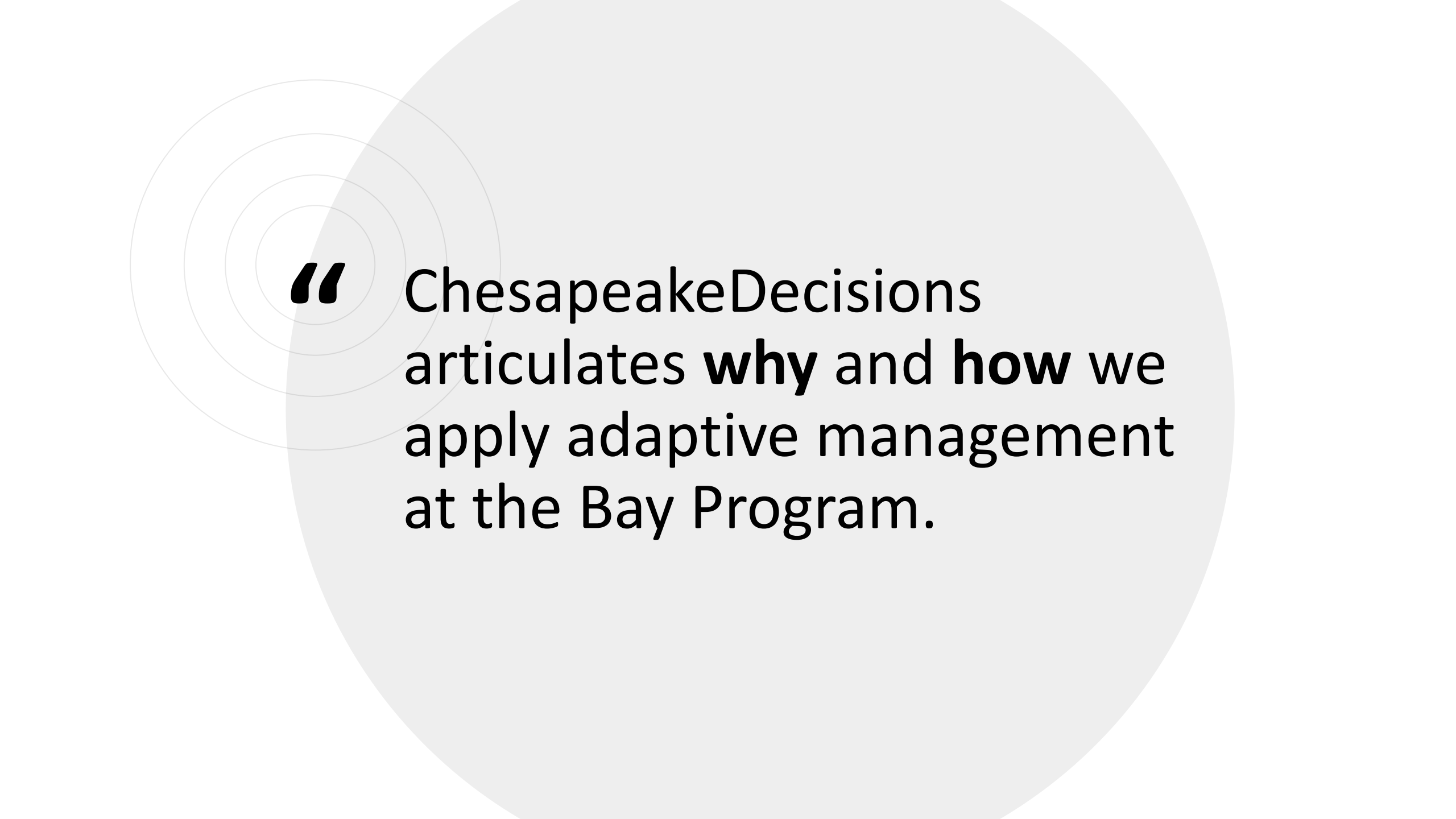


Chesapeake Bay  
Watershed Agreement



ChesapeakeDecisions

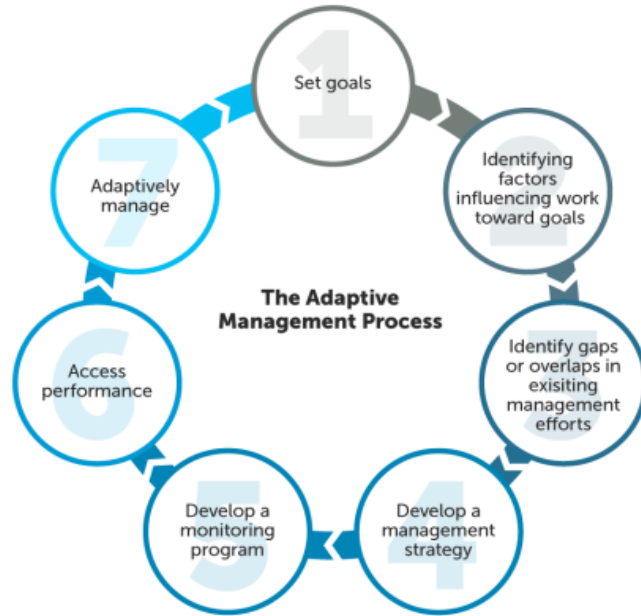
ChesapeakeDecisions documents and



“ChesapeakeDecisions  
articulates **why** and **how** we  
apply adaptive management  
at the Bay Program.

## What is adaptive management?

Adaptive management is a decision-making process that allows the Chesapeake Bay Program to make decisions in the face of uncertainty, reduce this uncertainty over time and learn while doing. Through this process, workgroups, Goal Implementation Teams (GITs) and the partnership as a whole are encouraged to take action, monitor results, assess progress and adjust efforts as needed.

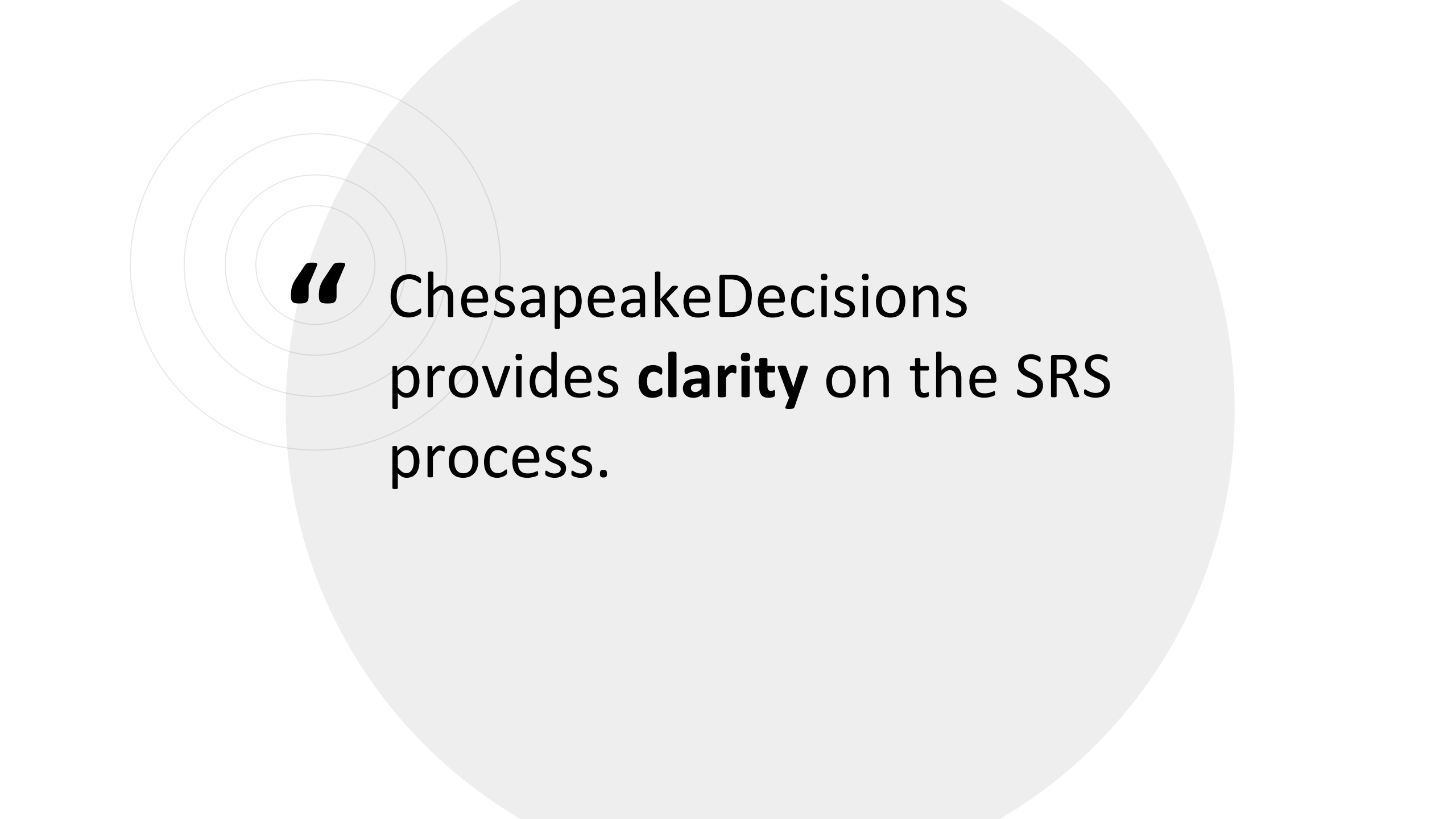


## Why is adaptive management important?

Adaptive management allows workgroups and Goal Implementation Teams (GITs) to recommend or request changes to the Management and Budget Task Force recommendations and the Chesapeake Bay Program's annual work plan.

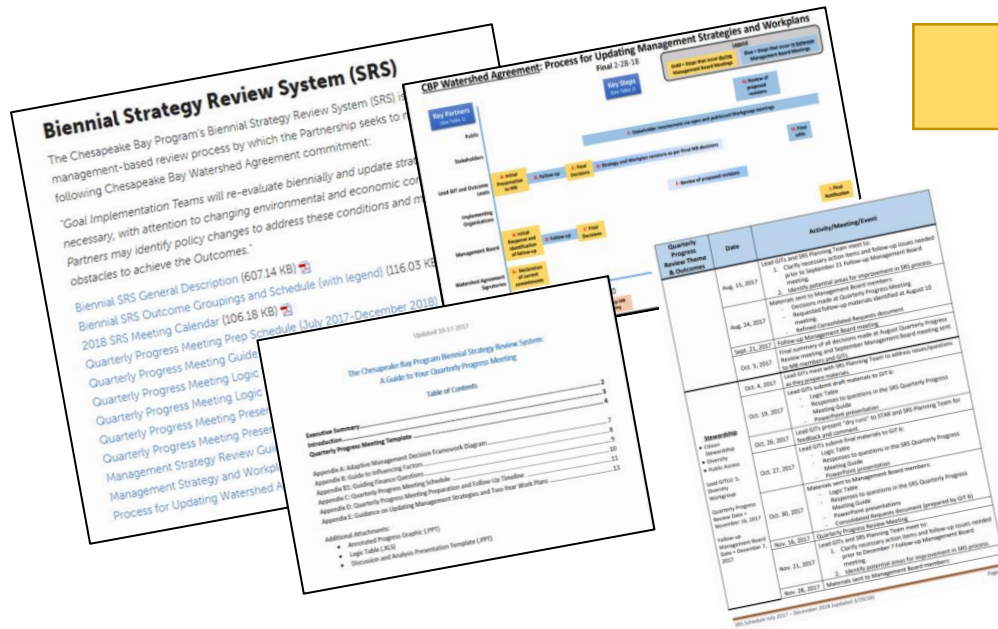
## How does the Chesapeake Bay Program adaptively manage its work?

The Chesapeake Bay Program adopted the Biennial Strategy Review System (SRS) in 2016 to help its workgroups and Goal Implementation Teams (GITs) follow the seven steps of adaptive management.



“ChesapeakeDecisions  
provides **clarity** on the SRS  
process.

# Current Guidance



ChesapeakeDecisions replaces multiple documents with one set of clear, step by step instructions.

# ChesapeakeDecisions

## During Your Meeting

During each quarterly progress meeting, the Chesapeake Bay Watershed Agreement outcome representatives within a particular cohort present to the Management Board. After each presentation, the Management Board discusses recommendations or requests for action, support or assistance and determines how to proceed.

Issues and asks raised during a quarterly progress meeting may be discussed, refined or resolved at the next month's meeting of the Management Board or at future Management Board meetings.

## After Your Meeting

### Three Days

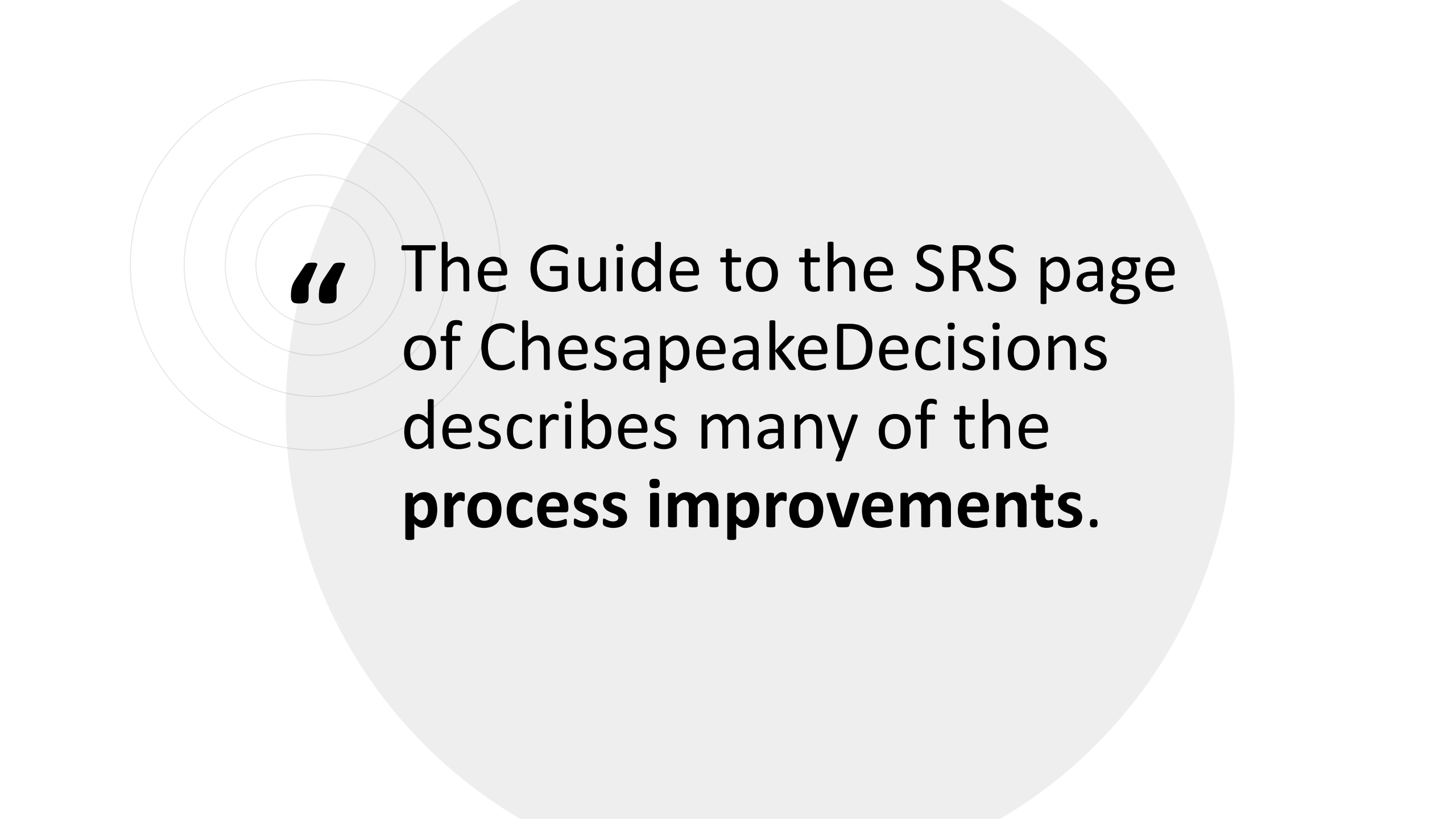
Three days after a cohort's quarterly progress meeting, the cohort is invited to hold a "debrief" with the SRS Planning Team.

### Two Weeks

Two weeks after a cohort's quarterly progress meeting, the cohort works with the SRS Planning Team to refine its requests for action, support or assistance. Refined requests—as well as any supporting documents or agreed-upon actions and decisions from the quarterly progress meeting—are sent to the Management Board and published on our Requests and Decisions page.

### Four Weeks

Four weeks after a cohort's quarterly progress meeting, the cohort attends another meeting of the Management Board to discuss, refine or resolve issues and asks raised during their quarterly progress meeting.



**“ The Guide to the SRS page  
of ChesapeakeDecisions  
describes many of the  
process improvements.**




# Process Improvements

- Improving support to Outcome leads to improve understanding and consistency.
  - *Providing consistent facilitation of initial workgroup meetings*
  - Meeting earlier with the Cohort leads to support work on draft materials
- Taking advantage of existing meetings and processes
  - SRS staff will communicate links, deadlines and requirements at regular Coordinators & Staffers meetings, rather than piecemeal to each workgroup or GIT.
  - Actions & Decisions for Quarterly Progress Meetings will be distributed the usual way via email, rather than discussed at a separate debrief meeting.

# Process Improvements (continued)

- Establishing clear deadlines with consistent guidelines for granting extensions.
  - To improve predictability of product review
  - To manage limited staffing resources
- Ensuring streamlined communication between the Management Board and the Outcome leads to decrease need for rework.
  - **GIT chairs or their designee** will be present and prepared at relevant Management Board meetings.
    - Quarterly Progress meetings
    - Necessary follow-up meetings
    - Meetings to present the final management strategy and logic and action plan.



**“** ChesapeakeDecisions  
guides users through the  
**streamlined tools** that help  
us adaptively manage.

# Logic and Action Plan –

## Pre-Quarterly Progress Meeting (second cycle)

Factor	Current Efforts	Gap	Expected Response and Application	Learn/Adapt
What is impacting our ability to achieve our outcome?	What current efforts are addressing this factor?	What further or information needed to fully address this?	How do we expect these actions to address the identified gap? How might that affect our work going forward?	What did we learn from taking this action? How will this lesson impact our work?
Should not change	Should not change	Should not change	Blank	Blank

Existing actions from 2-year work plan – written out and with red, yellow, green highlights

# New Narrative Analysis template

## BIENNIAL STRATEGY REVIEW SYSTEM Chesapeake Bay Program

### Narrative Analysis



[INSERT OUTCOME NAME AND DATE OF QUARTERLY  
PROGRESS MEETING]

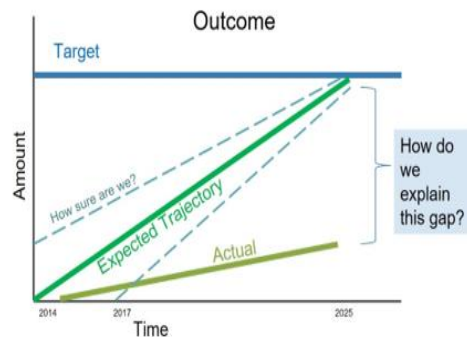
The narrative analysis summarizes the findings of the logic and action plan and serves as the bridge between the logic and action plan and the quarterly progress meeting presentation. Based on what you learned over the past two years from your successes and challenges, you will describe whether the partnership should make adaptations or change course.

Use your completed pre-quarterly logic and action plan to answer the questions below. After the quarterly progress meeting, your responses to these questions will guide your updates to your logic and action plan. Additional guidance can be found on [ChesapeakeDecisions](#).

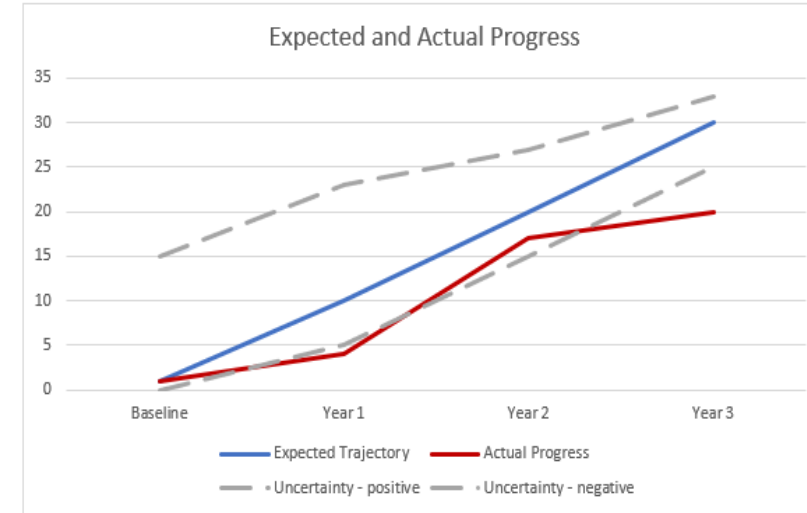
1. Examine your red/yellow/green analysis of your management actions. What lessons have you learned over the past two years of implementation?

*Summarize what you have learned about what worked and what didn't. For example, have you identified additional factors to consider or filled an information gap?*

2. Regardless of how successful your short-term progress has been over the past two years, indicate whether we are making progress at a rate that is necessary to achieve the outcome you are working toward. The example graph below illustrates this concept.



Use the **editable** graph below (or your own chart) to illustrate your progress. Explain any gap(s) between our actual progress and our anticipated trajectory.



3. What scientific, fiscal and policy-related developments will influence your work over the next two years?

*This may include information learned at the previous biennial SRS meeting or more specific information about your outcome such as an increase or decrease in funding, new programs that address gaps, and new scientific data or research. Describe how these developments are likely to impact your recommended measure(s) of progress, the factors you believe impact your ability to succeed, and newly created or filled gaps. These changes should be reflected in the first three columns of your revised logic and action plan after your quarterly progress meeting.*

4. Based on your response to the questions above, how will your work change over the next two years?


*Describe the adaptations that will be necessary to more efficiently achieve your outcome and explain how these changes will lead you to adjust your management strategy or the actions described in column four of your logic and action plan. Changes that the workgroup, GIT or Management Board consider significant should be reflected in your management strategy.*

5. What, if any, actions can the Management Board take to help ensure success in achieving your outcome?

*Please be as specific as possible. Do you need direct action by the Management Board? Or can the Management Board direct or facilitate action through other groups? Can you describe efforts the workgroup has already taken to address this issue? If this need is not met, how will progress toward your outcome be affected? This assistance may include support from within a Management Board member's jurisdiction or agency.*



**Revised presentation template – work in progress**



“ Completing **additional sections** in the Logic and Action Plan will move us forward in adaptive management.

# Logic and Action Plan – Post-Quarterly Progress Meeting (second cycle)

Factor	Current Efforts	Gap		Metrics	Expected Response and Application	Learn/Adapt
What is impacting our ability to achieve our outcome?	What current efforts are addressing this factor?	What further effort or information are needed to fully address this factor?		What will we measure or observe to determine progress in filling identified gap?	How do we expect these actions to address the identified gap? How might that affect our work going forward?	What did we learn from taking this action? How will this lesson impact our work?
Reflect on understanding	Reflect new understanding	New understanding	New actions (plus any carryover from previous work plan)	Complete		Blank



# Logic & Action Plan

The logic table illustrates the link between the factors that could impact the Chesapeake Bay Program's ability to achieve an outcome and the actions it is taking to manage them.



The logic table is made up of seven parts: factors, efforts, gaps, actions, metrics, response and lessons learned. To complete a logic table, workgroups and Goal Implementation Teams (GITs) should follow the steps below to update their previously completed logic tables or to fill out the logic table template.

## 1. List the significant factors—whether positive or negative—that could impact the Chesapeake Bay Program's ability to achieve an outcome.

Common factors include public engagement, landowner engagement and nongovernmental organization engagement; legislative and government agency engagement at the federal, state or local levels; partner coordination; use conflict; population growth; scientific and technical understanding; flora and fauna; habitat condition; climate change; and funding or financial resources.

## 2. List the existing efforts that are supporting the Chesapeake Bay Program's work to manage each of the aforementioned factors.

These efforts could come from within or outside of the Chesapeake Bay Program, and could be deliberately or unintentionally supporting the partnership's work. If, for example, public engagement is a factor that could impact the Chesapeake Bay Program's work toward a particular outcome, this outcome's lead GIT may decide to record ongoing efforts by the partnership's Communications Office to engage this audience around an issue important to this outcome. If legislative engagement is a factor, a GIT may decide to list ongoing efforts by advocacy organizations to influence federal, state or local policy.

## 3. List the gaps in management these efforts have left unfilled.

In other words, describe the unaccomplished efforts that, if achieved, would manage each of the aforementioned factors.

## 4. List the management actions that will fill these gaps.

These actions could be led by a team within the Chesapeake Bay Program or by a Chesapeake Bay Program partner.

## 5. List the metrics that will measure progress.

In other words, describe the observations that will indicate whether the aforementioned management actions are having their intended effect.

## 6. Describe the expected response of each management action.

Include the timing, magnitude and application of any expected changes and indicate how these changes could influence the Chesapeake Bay Program's work.

## 7. If applicable, describe the lessons learned following the implementation of a management action.

Describe how this observation has led or will lead to adaptation or change.

## ChesapeakeDecisions

### Adaptive Management

#### Guide to the SRS

[Logic & Action Plan](#)

[Narrative Analysis](#)

[Presentation](#)

### Timeline and Cohorts

#### Cohort Status

#### Requests and Decisions

#### Meetings and Deadlines

#### FAQ

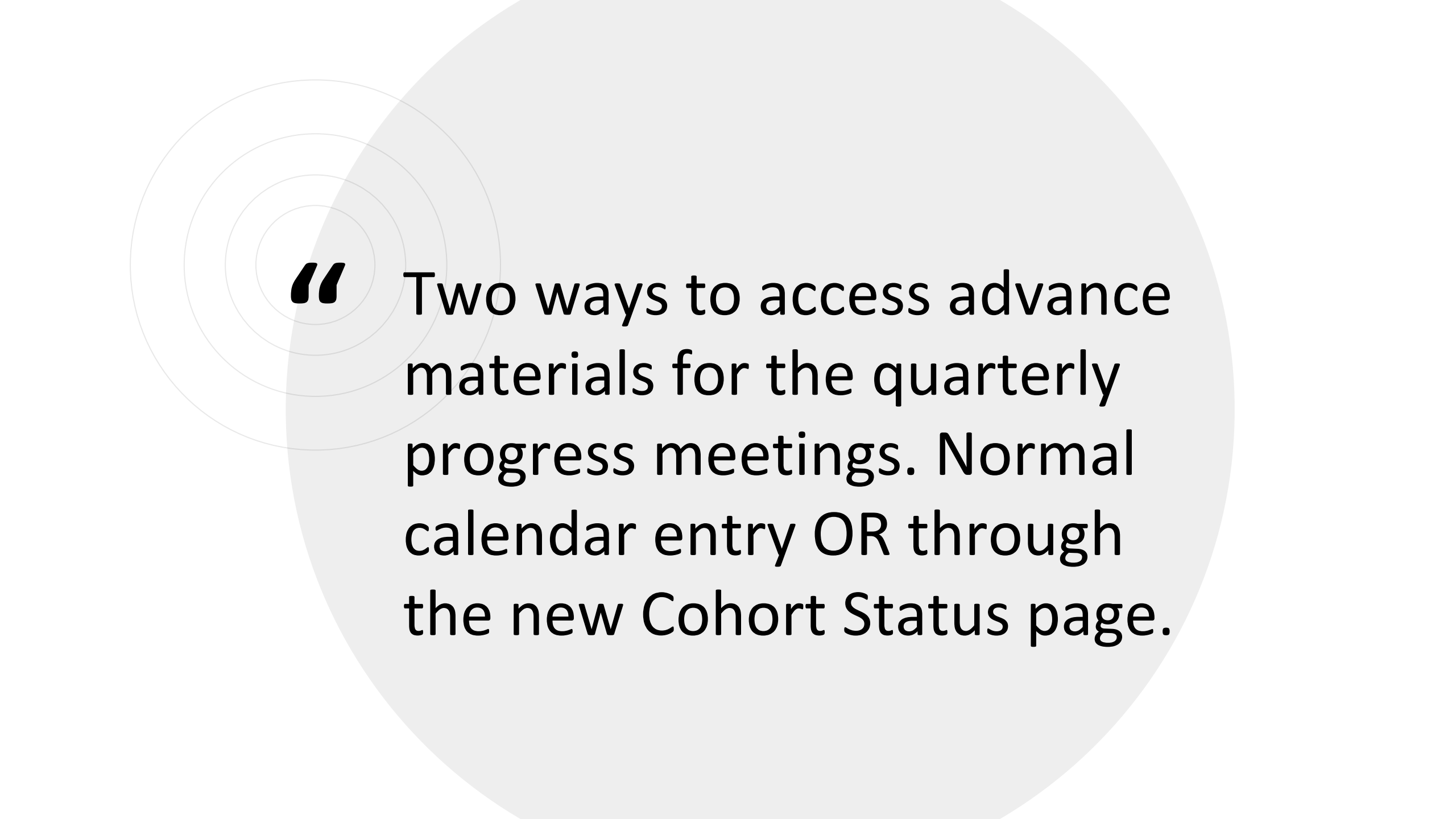
## Download Templates

[Logic & Action Plan \(.docx\)](#)

[Narrative Analysis \(.docx\)](#)

[Presentation \(.ppt\)](#)

[Download previous management strategies and logic & action plans \(.docx\) on SharePoint.](#)



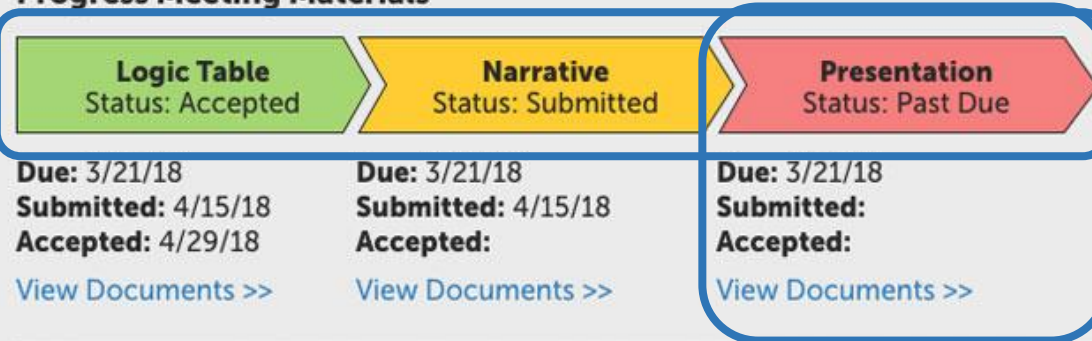
**“** Two ways to access advance materials for the quarterly progress meetings. Normal calendar entry OR through the new Cohort Status page.

# Healthy Watersheds

## Brook Trout

Mentor: [First Name] [Last Name]

### Progress Meeting Materials



### Management Materials



# Cohort Status

See materials needed

Track overdue items

View documents



**“** ChesapeakeDecisions  
provides **access** to the  
**results** and **impact** of the  
Strategy Review System.

# Requests and Decisions

Clean Water  
May 15, 2018

## Status of request

### Filter:

- ✓ By Cohort
- By Requesting GIT
- By Responsible Party

### Clean Water: 2017 and 2025 Watershed Implementation Plans (WIPs) Resolved

**Request:** The Water Quality GIT asked the Management Board to find additional financial resources to support the achievement of the...[\[Read More\]](#)  
**Decision:** At the Management Board's June 2018 meeting, Delaware, Maryland, Pennsylvania and Virginia indicated their likelihood...[\[Read More\]](#)

**Requesting GIT:** Water Quality  
**Responsible Party:** Management Board  
**Due Date:** June 14, 2018

### Forest Buffers

In Progress

**Request:** The Forestry Workgroup asked the Management Board to focus on improved forest buffer implementation. The Management Board...[\[Read More\]](#)  
**Requesting GIT:** Water Quality  
**Responsible Party:** Management Board  
**Due Date:** June 14, 2018

## Summary of request and decision

## Track responsible parties



“

ChesapeakeDecisions  
provides **transparency** to  
better manage and  
participate in the process.

## Filter By Cohort:

- ☒ Healthy Watersheds
- ☒ Aquatic Life
- ☒ Stewardship
- ☒ Next-generation Stewards
- ☒ Clean Water
- ☒ Climate Change and Resiliency
- ☒ Local Action

[View Past Meetings and Deadlines >>](#)

## Upcoming Meetings and Deadlines

**September 2018**

### Clean Water

#### Meetings

No scheduled meetings

[See event details →](#)

#### Deadlines

13  
WED

**Revised management  
strategies and work  
plans due to SRS  
Planning Team.**

### Climate Change and Resiliency

Filter by cohort(s) of interest

View upcoming meetings and deadlines and access documents from previous meetings.

It takes a village! Supporting staff have included:

**Guidance**

Doreen Vetter  
Carin Bisland  
Guy Stephens

**User Experience**

*Aera Hoffman*

**Content**

*Catherine Krikstan*  
Doreen Vetter  
*Laura Drescher*  
Joan Smedinghoff

**Design**

Dave Yayac

**Development**

Bill Whorton  
Dan Brellis

**Critical Input**

*Laura Drescher*  
Dave Goshorn  
Laurel Abowd  
Emily Freeman







# Questions?

## → ChesapeakeDecisions

Contact: [Vetter.Doreen@epa.gov](mailto:Vetter.Doreen@epa.gov)

## → SRS Process

Contact: [SRS@chesapeakebay.net](mailto:SRS@chesapeakebay.net)

Presentation template courtesy SlidesCarnival.

Images courtesy Shutterstock.